Project Charter (Version 2)   Date: 11/30/2010

Project Name: *Write out the entire, specific name.*

California Water Plan Update 2013: Guide for Writers and Editors

Sponsor/Program Manager	Paul Massera (*California Water Plan Update 2013* [Update 2013] Project Sponsor) Lew Moeller (Update 2013 Project Manager) Gretchen Goettl (Update 2013 Publications Team Lead)
Project Manager	**Sarah Sol** (Update 2013 Publications Team Co-Lead)

Project Objective Statement: *What must the project do? By when? Keep this statement to 25 words or less. Make it SMART (Specific, Measurable, Achievable, Relevant, and Time-based).*

By March 2011, provide initial editing and writing strategy for Update 2013, including style preferences, best practices, templates, policies, instructions, and tips, consistent with DWR standards.

Triple Constraint Trade-off

Resources	M	*Select a different flexibility letter for each constraint*
Schedule	N	*N= Not Flexible* *S= Somewhat Flexible*
Scope	S	*M= Most Flexible*

Estimated Start Date:	October 2010	**Estimated End Date:**	February 28, 2011

Project Deliverables: *What is the project going to produce? Create a list of tangible products that will result from project.*

A guide for authors and editors that outlines the general editing strategy for California Water Plan Update 2013 (Update 2013) and includes:

Phase 1
- a style sheet covering preferences in punctuation, grammar, and spelling topics (to be updated as needed after various review drafts of Update 2013, should comments from reviewers include editorial feedback);
- a description of the expected level of editing (what it includes and how long it takes);
- a preliminary glossary (based on last version's glossary);
- a list of preferred acronyms and abbreviations and a general policy about how to abbreviate terms within text;
- a recommendation for file organization and version control, as well as an established folder structure for the project on the network (with a link to Update 2009 files that may be useful to writers);
- a policy about citations/references and examples of them;
- Word templates to allow editors to format text easily (these will be electronic Word files that are mapped to InDesign templates);
- tips for writers about how they can review their content before it goes to editing or peer review;
- tools to help editors crosscheck references/citations and prepare acronym lists and glossary lists (instructions on macros and field codes);
- tip sheets on various topics of Word (track changes, table formatting, templates and styles, and any other topics requested);
- a process for team leads to request updates to the guide; and
- information on where to find project charters developed by other Update 2013 work teams.

Phase 2
- a matrix of Update 2013's editing/writing/review staff and roles;
- an overview of Update 2013's scope, purpose, and audience as well as a list of deliverables (the Update 2013 project manager would provide the information, and it may include details specific to each draft, if audience/purpose of deliverable change from one review draft to the next);
- a work flow/timeline for publications processes;
- a process for coordinating graphics and data;

- an overall (high-level) outline and tracking sheet for each volume of Update 2013 (these will be electronic and for use by the project management and editorial staff in tracking the status of text, graphics, and other parts/pieces);
- InDesign templates mapped to the Word templates;
- a proofreading checklist and description of the design concept (with specifics if different deliverables have different design needs); and
- the Update 2013 project manager's preferred approach for handling reviews/comments.

Strategic Fit: *What is the Strategic Initiative Identifier for this project?*

This guide is consistent with:
- DWR's Strategic Planning Goal 8, which provides for "professional, cost-effective, and timely services in support of DWR's programs, consistent with governmental regulatory and policy requirements";
- California Government Code Section 6219, describing requirements for state documents;
- Water Code Section 10004-10013, outlining requirements for the California Water Plan; and
- a new federal mandate, Plain Writing Act 2010.

Customer: *Who are you doing the project for?*

The editors (publications staff), authors (subject-matter team leads), project managers and coordinators, and readers of Update 2013.

Additional stakeholders include participating state agencies, tribal representatives, nongovernmental organizations, and the general public.

Customer Benefits: *What customer requirements does this project address? Relate these to: increase revenue, avoid costs, improve service, and/ or comply with a mandate? Create a short list of customer benefits.*

This guide will consolidate information related to the preparation of Update 2013. It will be designed to improve the efficiency of writing/editing tasks, ensure Update 2013's compliance with requirements for State documents, improve the consistency and accuracy of text and other content (thereby building trust in readers and helping authors/editors to meet readers' expectations), avoid costs associated with disorganization and inefficiency, meet larger project goals and DWR standards, and maintain the timeline of Update 2013 deliverables.

Successful Completion Criteria: *How will the success of the project be determined from the customer's perspective? Make criteria measurable so there is no doubt as to the project's success. Create a short list.*

Coverage of editing topics should be robust enough to improve consistency in spelling, acronym use, punctuation, and other editing topics while eliminating the need for multiple style guides (i.e., Chicago, Associated Press, Council of Science Editors, U.S. Geological Survey, etc.).

Tools (e.g., the macro/field codes for crosschecking references) should be easy to use and save editors time while also improving accuracy and consistency.

Text and other content prepared according to this guide's styles should have improved clarity and consistency when compared with Update 2009 (e.g., there should be references for all citations, each abbreviation/acronym should have only one definition, the design scheme should contain a different look for pulled quotes vs. column notes, etc.).

Project Background: *What is the primary motivation for this project? Include a brief high level description of the business area, the current situation, the desired situation, and the gaps that exist. This summary builds on your description in the Project Initiation form.*

Large, high-profile documents like the California Water Plan require robust document management, in addition to project management, as well as the cooperation of numerous writers, editors, graphic designers, and technical staffs. Comprehensive guidelines for various facets of the editing and writing process—from the smallest details to the big picture—can ensure that everyone involved with Update 2013 is on the same page about standards and practices and can help everyone work together to produce a consistent, coherent, professional product.

Project Scope:

In Scope: *List areas and functionality included in project.*	Out of Scope: *List areas and functionality not included in project.*
Best practices and strategies for document management, editing, and writing.	The guide will focus on document management, not project management (i.e., it won't cover team budgets, staffing,

Overall deadlines for content/graphics to come to editing staff/production staff.	contracts, or other necessary considerations of the project that do not directly relate to the document's editing and writing needs). The guide will have timeframes for when each work team should provide content to the publications staff but will not include internal deadlines that specific work teams may need to develop for their work in order to have their final content ready for editing/production.

Dependent Projects: *What projects must be underway or completed before this project can be successful?*

A proofreading checklist and InDesign templates will not be possible until the design approach/branding of California Water Plan Update 2013 has been determined. This may require cooperation with graphics staff.

Various parts of the guide will require input and approval from others (Update 2013 project manager/sponsors etc.).

Timeframes/deadlines may depend on enhancements described in individual work team charters (currently not completed), as well as committee meetings and various review draft deadlines.

Software (Documentum) may be installed at some point during work on Update 2013 and may change the way we organize and archive files and folders.

The guide may need updating throughout the Update 2013 project, if comments on various review drafts relate to editing styles or practices.

Risks: *What characteristics or situations could cause this project to fail? Identify those items which are outside the jurisdiction of project and could result in a "show-stopper" to the project success. Create a short list.*

Workload conflicts (other projects) or staff turnover, lack of support/input from Update 2013 project managers/technical staff, delays in establishing a final style for Update 2013 because of conflicting preferences in topics related to writing and design, changes in values or practices when the State's administration changes in January 2011.

Assumptions and Constraints: *What assumptions were made in defining project? Are there constraints to the execution of project? List assumptions and constraints.*

Customer benefits of this guide assume that all editors (and interested authors) working on Update 2013 will be aware of its style preferences and use the tools provided in this guide.

This Project Should Have: *See list below this grid. The materials there are being prepared primarily as part of my participation in the Project Management Applications Workshop. They're likely unnecessary for this guide project, in actuality.*

Project Management Plan ☐	PMP will include: *check all that apply*	Work Breakdown Structure ☐	Communications Plan ☐	Procurement Plan ☐	Human Resources Plan ☐
Quality Management Plan ☐	Stakeholder Register ☐	Risk Register ☐	Project Budget ☐	Project Schedule ☐	DWR Form 1498 ☐

- Project management plan
- Stakeholder register
- Communications matrix
- Statement of scope
- RACI matrix
- Work breakdown structure

Major High-Level Milestone Targets: *What events measure progress? E.g. Initiation Approved, Analysis Complete.*

Milestone	Target Date
Begin work on Phase 1 deliverables and seek input from previous California Water Plan editor and other publications staff members.	Already begun
Meet with Update 2013 project manager/project sponsor to discuss deliverables of this guide (especially Phase 2).	Dec. 10, 2010
Submit draft parts of the guide to Gretchen Goettl for review.	Jan. 3, 2011
Incorporate Gretchen's input.	Jan. 18-Jan. 25, 2011
Submit the draft guide to Lew, Paul, and others (Kamyar?) for review. (Possible meetings to discuss their input, as well.)	Jan. 26, 2011
Incorporate Lew's and Paul's input.	Feb. 10-21, 2011
Provide to interested work team leads at weekly meeting for discipline-specific input.	Feb. 22, 2011
Make final changes to guide.	Mar. 1-7
PDF and disseminate guide to Update 2013 editing staff, project managers, and interested work team leads.	Mar. 8, 2011
Conduct training for document staff as appropriate (in Word topics such as tracking changes, for instance, or in editing topics, such as reference/citation crosschecking, etc.).	As needed
Update guide if review drafts of Update 2013 generate any feedback about editorial styles/practices.	As needed
Archive final guide along with Update 2013 materials upon the final publication of Update 2013.	Early 2014

Project Core Team Members

Team Member	Phone/E-mail	Role
Sarah Sol	(916) 651-9610 ssol@water.ca.gov	Co-lead, Publications Team for Update 2013 (responsible for preparing and disseminating guide)
Gretchen Goettl	(916) 651-9605 Goettl@water.ca.gov	Lead, Publications Team for Update 2013 (input/approval)
Lew Moeller	(916) 653-5666 lmoeller@water.ca.gov	Project manager for Update 2013 (input/approval)
Paul Massera	(916) 651-9614 pmassera@water.ca.gov	Project sponsor for Update 2013 (input/approval)
Additional publications team staff, including representatives of graphics/design/repro staffs	Various	Technical support (may provide input, may be end user of guide)
Team leads for Update 2013	Various cwp_work_team_leads@water.ca.gov	Section authors of Update 2013 (may provide input to this guide, may be end user of guide)

Charter Version Number: 2	
Updated By: Sarah Sol	Date: 11/30/2010
Approved By:	Date: